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## Clarifications

### To Request for Proposals N° PTD/10/039



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**Subject: Provision of software as a service solution for WIPOSTAD surveys**

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1. Invitation letter: can the sealed envelope containing the proposal be hand delivered to WIPO's reception?
  - Yes, the sealed envelope can be hand delivered to WIPO Reception.
2. Annex I Terms of Reference: how does the scope of this RFP relate to the "revision of the active part of WIPO IP standards (Part 3)" (section 1.1.3)?
  - Part 7 only is concerned. However, new types of survey regarding Part 3 and Annual Technical Reports should be also dealt with by the same solution (see third paragraph of Section 1.1.3). See answer to question 38.
3. Annex I Terms of Reference: is it acceptable that the survey platform supports multiple languages & alphabets, while the translation process takes place independently outside of the survey tool (criteria numb. 2.1.9)?
  - Yes but the survey tool should provide a mean to import automatically through a batch process all translated texts from an MS-Excel file (e.g. translated answers).
4. Annex I Terms of Reference: what is the purpose of exporting "questionnaires" in editable formats (criteria numb. 2.1.13)?
  - The translation process is already in place at WIPO, through predefined tools (MS-Word and MS-Excel) and, in the future, will be inside WIPOSTAD. The purpose of 2.1.13 is simply to ensure compatibility with this process.
5. Annex I Terms of Reference: is the purpose of "keeping versions of questionnaire, answers by each respondent and survey reports" to allow on-line access to these various objects for retrieval, consulting, comparative analysis.... (criteria numb. 2.1.14)?
  - Yes but only for WIPO staff (no on-line access to respondents). Different versions of questionnaire, answers by each respondent and survey reports should be accessible to the general public through WIPO STAD not through the expected solution. However, all versions should be stored permanently by the expected solution.
6. Annex VI Information Security Agreement: as the RFP calls for a "Software as a Service" solution, there should be no need for the Contractor to access WIPO's Information Resources. Therefore, should this annex be filled out?
  - Yes.
7. Kindly let us know the commencement date of the project and the expected project plan with major milestones that we need to achieve.
  - The commencement date is bound to contract signature which should happen as soon as possible after bids evaluation. However, the project is planned to be completed by September 30, 2010.
8. The WIPOSTAD Part 7 surveys and associated reports must be stored in a repository (DMS - Document Management System) for further distribution and publishing. Is it correct, that this DMS already exists and therefore is not part of this RFP and the solution has to supply solely an interface to this DMS?
  - Yes.
9. If yes, which are the requirements for this interface?
  - The interface is expected to be based on files transfer only. The possible formats of these files are essentially for the purpose of translation and are indicated under criteria Nb 2,1.13. The file naming convention used to identify each of these files will be specified later.

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10. Will the individually filled out questionnaires be published / archived on that DMS platform or will the solution have to manage the questionnaires?
- WIPO STAD will make available questionnaires, answers by each respondent and survey reports, as well as their different versions (please see Nb. 2.1.14), which should also be archived in the expected solution platform. See also question 5 above. The solution have to manage the filled out questionnaires but see 2.4 "The expected solution should allows for "data exports" of Survey and collected response data exports in an industry standard format...". Those data exports may include "archived filled out questionnaires".
11. *Criteria number 2.1.12 "Automatic generation of collation reports in several languages":*
- a) What kind of elements should be included in these collation reports?  
See survey report example in criteria No. 2.1.5
  - b) Is a WYSIWYG editor required at that level?  
No this is not a requirement and as such will not be considered as selection criteria.
12. *Criteria number 2.1.14: "Keeping versions of questionnaire, answers by each respondent and survey reports"* Could you clarify this point? Does it means either that :
- a) Each time an object (questionnaire, answers or survey reports) is modified a copy "before modification" should be archived in database?  
Yes.
  - b) Each object (questionnaire, answers or survey reports) has to change its "version number" after each change?  
Yes. The versioning should be controlled by human (not automatic) to avoid increasing version number for editorial changes.
13. *Criteria number 2.1.17 "Spell checking for both questionnaire answer fields and report editing tool":* In which languages should the spell checking be available?
- Spell checking should be available for English, French and Spanish languages only. The solution should be extensible to other WIPO official languages in the future. Criteria No. 2.1.9 is to indicate the minimum set of languages that the solution should support; i.e., the solution should allow respondents to provide certain parts of the text in their own national languages (for instance, in a survey on different kinds of patent documents, offices could be invited to provide the titles of the documents in both national and English language).
  - Note that "ar" should be added to the list given in Criteria No. 2.1.9.
14. *Criteria number 2.1.29 "Answer to be marked or filled in table and cell-unit information to be processed in collated report":* Could you clarify this point? Does it simply means that, in collated report, data from answers have to be inserted/merged automatically?
- The solution should be able to collate answers provided in specific cells of a table as if they were answers that are not provided through tables. This should apply to both cases when the answers are marked among different options and when they are filled in by the respondent. This means that the treatment given to answers provided in specific cells of a table should be similar to the treatment given to answers provided under criteria Nb 2.1.20, 2.1.21, 2.1.22, 2.1.23. Subsequently, once the collated results coming from answers provided in specific cells of a table are prepared, the solution should be able to process this information as any other piece of information for preparing the report.

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15. *Criteria number 2.1.18. "Distribution of questionnaire to some 200 potential respondents and answers from between 50 to 100 respondents":* Is it required to include a database of contacts in the tool, or will the invitations to answer be sent from another newsletter/ mailing system?
- Yes, invitations to answer be sent from another newsletter/ mailing system. This criterion is just to provide information about the expected number of respondents.
16. *Question about the location of WIPO staff that will collaborate on this project (if this question is allowed in a RFP) :* From which locations WIPO officials would work on this project for its:
- a) Technical integration
    - Geneva
  - b) Project management
    - Geneva
17. We have already some contracts with the United Nations but not with WIPO.  
Would you recommend us to register as potential solutions provider immediately, or will it be automatic when we submit a proposal for this RFP?
- Registration at WIPO is only meant for receiving tender automatic notifications, should you wish to limit the risk that your company miss a tender, than register immediately.
18. Could you please provide us information on the volume of users for the application
- a) Total number of users:
    - See Criteria No. 2.1.18. for respondents. The estimated number of administrative users is 5.
  - b) Number of concurrent users:
    - Same.
19. If any, which language would you recommend for the development the application (Java, .net, PHP)?
- See 3.1 this should be transparent to WIPO. However, required application developments (if any) must be indicated.
20. What kind of analysis phase are you envisaging? Could you be more detailed (ref 2.1.42)?
- The qualitative and/or quantitative analysis will depend on the kind of questionnaire and the nature of the survey. The analysis tool is to assist the production of the final report (see examples in Criteria Nb 2.1.5) on the basis of raw data provided by respondent. Criteria 2.1.42 indicates that, in addition to the criteria associated with the collation of the results (2.1.2, 2.1.12, 2.1.29, 2.1.32, etc), the solution should also provide other analysis facilities to assist to the interpretation of the results and to the production of the final report.
21. Could you please clarify more in details the point 2.1.29?
- See question 14 above.
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22. Could you please clarify more in details the point 2.1.30?
- It might happen that for the same questionnaire an office has to provide different sets of answers to the entire questionnaire depending on certain issues (e.g., answers) related to that specific office. For example, if we consider a survey on numbering systems used by offices, if a respondent answers that five "Numbering system" are in use in the office, then the system may ask the office to fill-in the questionnaire for each one of the five numbering systems (i.e., five different sets of answers to the same questionnaire would be provided by that office).

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23. What kind of report would you be able to launch with the application? Could you please provide some examples?
- See examples given in Criteria No. 2.1.5. More examples are available at: [http://www.wipo.int/standards/en/part\\_07.html](http://www.wipo.int/standards/en/part_07.html).
24. If you want to give the right to a user to access to this application, how would you like to do it? Though the application? Via an email notification to your partner?
- No, access by respondent to the survey system is expected to through WIPOSTAD (after CAS authentication) on the basis of information provided in the invitation email sent to each respondent (e.g. dedicated URL in WIPOSTAD which itself will include a link to the relevant questionnaire hosted by the expected solution).
  - Access by WIPO staff (e.g. survey administrator) can be through different means to be agreed upon between contractor and WIPO.
  - Criteria 2.1.1 should read "access to expected solution through a restricted access part of WIPOSTAD with CAS (Central Authentication Service) authentication".
25. Could you please clarify more in details the point 2.1.8?
- Depending on the answer given to a question, label or options of subsequent one(s) may change, i.e., the subsequent question(s) should be customized depending on the answer to a previous question. For example, a question asks the application numbering format on the basis of different possible components, namely code of IP type, year designation, serial number, additional part. If office A answer the question that they use IP type and serial number for application number, the subsequent question should ask the office A about IP type and serial number only. If office B answers the question that they use serial number and year designation, the subsequent question should ask the office B about serial number and year designation only.
26. With which versions of browsers the application should be compatible?
- At least with Internet Explorer 6 and Firefox 3 and with their respective higher versions.
27. What is the allocated budget for this project?
- WIPO does not reveal planned budget, if it exists.
28. Who will do the selection and what are the different steps of this process?
- Please see a description of our procurement process at [http://www.wipo.int/procurement/en/process\\_and\\_procedures.html](http://www.wipo.int/procurement/en/process_and_procedures.html).
29. What do you think about using Agile methodology like SCRUM, RUP?
- For operations, concerned WIPO users are not expected to learn new methodology and currently do not use Agile methodology. See also criteria No. 2.1.5 and section 3. For evolutions of the expected solution such methodology can be considered.
30. Customer team can work in WIPO building during development phase?
- Yes.
31. How many persons are dedicated to this project in WIPO?
- Between 1 and 10 at various level of involvement (from 5% to 100%).
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32. For how many years do you want the support and maintenance of the application?
- 1 year maintenance and support contract with an option for extension for up to additional 3 years on an annual base at the sole discretion of WIPO.

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33. Do you want a fixed price for the complete project or do you accept a mixture of times & material for the analysis phase and fixed price for the implementation of the solution?
- Please see Annex VII Price Schedule.
34. Are you open to work with a solution based on open source products?
- See answer to question 19.
35. Do you want the trainings to be organized on-site (WIPO), in Geneva, or are you open to travel in Europe to get trained?
- Training should be preferably provided in WIPO premises in conditions that WIPO users will experiment during normal use of the solution.
36. Do you need administrators and end-user trainings?
- Any training needed to operate the expected solution but not to perform tasks planned for Contractor under section 3.1 (e.g. hosting, IT operations, system support and maintenance...). WIPO users should be trained for using the expected solution (e.g., preparation of questionnaires and reports). Final respondents, from offices, to the survey should not need any training, see criteria No. 2.1.5.
37. Please confirm whether the design of the survey question is within the scope of this RFP
- Yes, but under conditions described under 3.4.
38. There seems to be a slight confusion as to the scope as the 3rd paragraph under this section (1.1.3) talks about solution for Part 7 surveys only. Please confirm.
- The purpose of section 1.1.3 is to introduce the IT project for which this RFP is expected to provide a component. The expected solution will be used initially for part 7 surveys and later extended to other surveys (e.g. ATRs) but no particular distinction is needed for the expected solution.
39. It is assumed APIs will be exposed by WIPO in CAS for authentication users (see 2.1.1). Please confirm.
- No, this is not needed. See response to question 24 above.
40. Please define what you mean by Answer Collation based on respondent identity (see 2.1.2). Please explain with the help of an example.
- Respondent's identity is needed in reports (e.g. to produce answers like "the list of offices which... is as follows: ").
41. It is assumed that we need to maintain this page in multi lingual mode and nothing else needs to be done further on this page (see 2.1.3). Please confirm
- No, this page includes information about how accessibility should be in the expected solution (e.g. to facilitate access for visually impaired).
42. Please explain 2.1.4 with the help of an example.
- If a new iteration of a survey conducted in 2009 is performed in 2010, the 2010 questionnaire for a respondent should be pre-filled with answers provided by the same respondent in 2009 so that the respondent has only to modify answers that are no longer valid in 2010.
43. Please provide the complete list of languages for which the software is to be developed (2.1.9).
- About "software is to be developed". Please see 3.1 and response to question 19.

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- The list under 2.1.9 is about questionnaire languages, not about programming languages. This list describes the minimum set of language support for the expected solution. See answer to question 13.
44. Also it is assumed WIPO will provide all the translations regarding the questionnaire survey and the site content (see 2.1.9). Please confirm.
- Yes this is correct. See also answers to question 3 and 4 above.
45. Can the current Information Security Policies / practices being followed at WIPO be shared at this moment (see 2.1.15)?
- No but this can be limited to preventing situations potentially threatening service performance and availability e.g. virus checking, preventing upload of too big files.
46. Does this mean that the questionnaire or link to the questionnaire will be sent out to a mailing list, and if so, does the application need to maintain mailing lists (see 2.1.18)?
- See answer to question 15 above.
47. Can you give examples of question types (see 2.1.36)?
- This item is an introduction to aspects described in more details under section 3.
  - The criteria should read “assistance for the design of new questionnaire or evolution of the expected solution should be possible under conditions described in section 3.”
  - See answer to question 23 above.
48. What kind of analysis is expected on the answers provide. What functionality are you expecting of the tool (2.1.42)?
- See answer to question 20 above.
49. What legacy surveys are currently hosted? Can we have access to the legacy surveys (see 3.2)?
- This is to ensure in future that WIPO has a possible transition path in case the expected solution does no longer meet WIPO requirements. In such situation, it is expected that import of archived questionnaires, answers and report templates would be facilitated through the use of appropriate format for exchange between IT systems (e.g. XML). See answer to question 23 above for examples of legacy surveys.
50. Criteria 2.1.3 Accessibility of application to disabled: what does this mean? Are we looking at any specific formats or voice based system for disabled? Please elaborate on the requirement:
- The expected solution should be such that disabled users (who would have their own specific equipment) would be able to access information usually expected to be read by the user. W3C recommendations inside the referenced in the WIPO page are to be followed. We advise to read carefully these W3C guidelines and to check the expected solution against them e.g. see <http://www.w3.org/WAI/eval/Overview.html>.
51. Criteria 2.1.9 understood as “Application should support multiple languages”. Does the system expect auto translation?
- No the system does not expect auto translation. See also answers to question 3 and 4 above.
  - See answer to question 13 above.
52. Criteria 2.1.15 understood as “Only online responses can upload the attachments”. Does including an attachment means both online and offline?

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- Although the Terms of reference do not mention it, the expected solution was hardly envisaged as working off-line in particular to ensure that criteria 2.1.7 and 2.1.39 are met. The idea behind 2.1.39 is to save the draft answered questionnaire as is at one point in time on the server, to the local machine).
- In view of the above, “including attachment off-line” is not relevant.

53. Criteria 2.1.36. understood as “Apart from existing question formats WIPO needs new formats to be created by the developer with out the help from the contractor”.

- The term “developer” is not appropriate in this context. Please read “WIPO staff” instead and see answer to question 47.

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